



# **Report to the Commissioners**

## **Area IX Agency on Aging, Flathead County**

### **April 16, 2018**

**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals  
FY 2017 annual targets  
FY 2017 actuals  
FY 2017 actuals as a percentage of annual targets  
FY 2017 actuals as a percentage of FY 2016 actuals  
FY 2018 actuals to date  
FY 2018 annual targets  
FY 2018 actuals as a percentage of FY 2018 annual targets

**The general target is 75% for FY 2018, July 1, 2017-March 31, 2018**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

#### **Data to note:**

##### ▪ **Meals/Nutrition**

- Total meals served continue to be above target for this fiscal year and on pace with actuals for last fiscal year.
- The annual nutrition surveys have been collected and are being tabulated. The results will be presented in next month's report.

##### ▪ **Transportation**

- Rides are 10% above target for the year at 85% due to the addition of the GNP commuter during the summer season and a 6.7% increase in Dial-A-Ride rides over this time last year.
- Overall rides for the month are up by 484 over March of last year.
- Excluding the GNP commuter, rides for the year are now slightly above this time last year.
- Fixed route rides, without the addition of the GNP commuter, lag 10.9% due to a substantial decrease in Kalispell city bus rides (mostly on the PM route). However, this is a substantial decrease from the almost 15% lag from last month. Rides for the Kalispell route (both AM and PM) were up again this month.
- If last quarter rides for FY 2018 equal the number of rides in the last quarter of FY 2017, we will end the year with approximately 97,000 rides. If last quarter rides for FY 2018 equal the

average of FY 2018 third quarter rides, we will end the year with approximately 100,000 rides. Either scenario results in a record number of rides (previously set in FY 2014 at 94,535).

▪ **Information/Referral and Assistance**

- At 81% of our annual target, we continue to experience a high volume of client calls and requests for assistance, due in part to state funding cuts to other services and providers, especially the local DPHHS Offices of Public Assistance. We are in the process of streamlining some processes and procedures to achieve greater efficiency, and we recently gained access to the internal Office of Public Assistance database so we can better serve those seeking help. However, we continue to be limited by the size of our staff and our own budget constraints.

▪ **Independent Living Services**

- Although we resolved our client enrollment issues, we continue to be below target for the number of people served and the number of units of service provided for the year. This will continue through the end of the fiscal year as we are managing the 2.5% cut in state funding for the current fiscal year by freezing IL services. We anticipate managing potential cuts in FY 2019 through attrition rather than any suspension of services.
- The annual IL survey has not yet gone out but will by the end of the month.

**AOA Administration**

***Budget and Contracts***

- We participated in the admin review of the FY 2019 county budget on 4/3/18. Commissioner review is set for 4/30/18.
- We are working on amendments to the FY 2018 DPHHS contract budget to reflect a 2.5% cut in state general funds for FY 2018, to be taken out of remaining payments for the year beginning in February. We do not have firm budget allocations for FY 2019 (state or federal funding) and may see up to a 5% cut in state general funds (calculated based on the original budget for the biennium, not from the 2.5% reduction in FY 2018).
- We received the signed contract from the VA to allow us to begin serving veterans through the Veteran-Directed Home and Community-based Services (VDHCBS) program.
- We received a contract from DPHHS for the BEC grant that began on 1/1/2018. It has been sent to Tara for review.

***State/Federal/Legislative Issues***

- Lisa participated in several M4A/DPHHS conference calls in March/April regarding changes to the Legal Services Developer program at DPHHS. She will attend the quarterly meeting April 25-26 in Helena.
- Congress passed and the President signed a budget bill through the end of September that includes increases for Older Americans Act Supportive Services (Title IIIB, 10% increase), Nutrition Services (Title IIIC, 7% increase), Caregiver Support Services (Title IIIE, 20%), Health Promotion Services (Title IIIE, 25% increase) and Ombudsman (Title VII). The SHIP program, which supports us to provide Medicare and benefits counseling, survived elimination proposals and some of the FY 2017 funding cuts were restored. Other programs that help older adults that were in jeopardy of being eliminated also saw increases, such as LIHEAP (low income energy assistance) and CDBG. In addition, Section 202 senior housing programs saw an increase for the first time since 2011. We do

not yet know how the OAA and Ship increases will affect us as Montana is a minimally funded state. We will monitor budget efforts for the federal fiscal year beginning October 1, 2018.

### ***Building***

- A gas leak was discovered. Northwestern Energy dug up the north end of the alley between the South Campus and the Adam building, repaired the leak, then restored the alley.
- Punch list update:
  - The drywall cracks in the dining room have not yet been repaired, and the repairs in the lobby ceiling have not yet been repainted.
  - The small kitchen freezer is working well again after a service call in February, but we have requested additional information about possible system upgrades that could eliminate the remaining problems related to the defrost cycle.
  - We plan to monitor the temperature in the dry storage area in the summer as modifications were made too late in the season to know if they were effective in reducing temperatures.

### ***AOA Advisory Council***

- The Advisory Council did not meet in April. The next meeting will be May 10, 2018.
- A council member is looking into what it would take to create a 501(c)(3) to fundraise for AOA programs and services.

### ***Other***

- Staff sorted through another 35 boxes from the Records Department and approved all but 3 boxes for shredding. Staff have now gone through all AOA/Eagle Transit boxes and approved elimination of the vast majority.
- We continue to work on the Continuity of Operations Plan (COOP).

### **HR/Staff Development**

- We have three open positions in the process of being filled: Resource Specialist (1.0 FTE), Kitchen Assistant (.625 FTE) and Bus Driver (.75 FTE)
- Four staff completed required annual Information and Assistance/SHIP recertification from DPHHS.
- On 3/6/18, Lisa attended a training workshop on the Collective Impact community development model.
- On 3/22/18, Lisa met with Missoula Aging Services (Area VII Agency on Aging) director and management staff to get information on programs, policies and procedures we might adopt here to achieve greater efficiency and effectiveness.

### **Outreach/Education/Media**

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 3/1/18, announcement/ad in KSC Gazette re. Volunteer Appreciation event and Healthy Aging presentation, 300
- 3/5/18, monthly KGEZ interview, 11,000
- 3/9/18, presentation on Leadership Flathead Panel, 50
- 3/17/18, Joint AOA/KSC Volunteer Appreciation luncheon/event, 196
- 3/27/18, Medicare 101 class, 8
- Promotion of Medicare 101 class in Daily Inter Lake and on county website, 17,000
- Promotion of AOA Advisory Council meeting in Daily Inter Lake and on county website, 17,000

### **Age-Friendly Flathead**

- The Steering Committee will hold its next monthly meeting on 4/19/18.
- On 4/7/18, Lisa provided Commissioners with additional information about age-friendly designation for their consideration via email.

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant
    - The Planning Committee met on March 27, 2018 to review the final draft of changes to the Kalispell/Evergreen routes and recommend for Transportation Advisory Committee (TAC) consideration.
    - The TAC met on April 5<sup>th</sup> to review the recommended changes. Members voted unanimously to approve the changes as presented.
    - Lisa presented the recommendations to Commissioner Holmquist on April 6<sup>th</sup> and informed Commissioner Mitchell of TAC approval the following week.
    - The next step is for staff and Planning Committee Chair, Chuck Wilhoit, to meet with staff from the cities of Kalispell (4/23), Whitefish (5/1) and Columbia Falls (5/1) to inform them about the changes and how they will impact city residents.
    - The meetings with city staff will be followed by public information meetings and multi-media outreach efforts to educate the public in anticipation of a July 1, 2018 roll-out.
  - The next quarterly report is due at the end April 30th.
- Outreach/Education/Media/Special Events:
  - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
  - As required by federal regulations, a monthly ad ran in the Daily Inter Lake on 3/14/18.
- Operations:
  - Overtime expenditures are minimal, but we continue to rely heavily on contracted employees to fill shifts due to vacant positions and drivers on extended leave.
  - Vehicle maintenance costs are higher than expected. We are looking at rental/leasing options in lieu of making costly repairs to older/high mileage buses to hold us over until we receive new buses that are scheduled to arrive shortly.
- Transportation Advisory Committee (TAC)
  - See above regarding 4/5/18 meeting. The next meeting is scheduled for June 7, 2018.
- Glacier National Park
  - Commissioners approved a change to the Cooperative Agreement setting the budget for the agreement year that began on October 1 2017 and clarifying GNP's sole responsibility for repairing/replacing damaged buses, allowing Flathead County to drop collision/property damage coverage on park-owned buses for FY 2019.
  - We continue to work on options for disposing of the Optima buses, ownership of which has now been released to Flathead County from the State of Montana.

### **Nutrition**

- The annual survey responses have been received. We are in the process of tabulating results and will include them in next month's report.

- The Flathead County Animal Shelter donated 100 pounds of pet food for senior clients to take for their pets.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- We continue to work with the IT Department on the new AOA website.
- The annual survey has not yet gone out but will by the end of this month.
- Independent Living Services: We continue to have a waiting list for all services and are working out final details for implementing a sliding fee scale at the beginning of FY 2019.
- We have begun receiving referrals from the VA for the Veteran-Directed Home and Community-Based Services Program – five (5) to date. Per our agreement with the Area VI Agency on Aging, they will pay us a monthly fee to coordinate services for veterans living in Flathead County until there are enough veterans consistently enrolled to sustain the program, at which time we will take over program implementation.

### **RSVP**

- Grant update: We now have access to the federal website and will submit the final FFR shortly.

### **Senior Mobile Home Repair**

- The Advisory Board met on 4/11/18. The next meeting will be May 9, 2018 at 10:00 am at Flathead Electric.
- One (1) project was completed; 5 are in progress; 17 need assessment; 25 are on the waiting list.
- Whitefish Soroptimists donated \$3,000.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- The meal site agreement with the Lakeside Chapel is still pending.
- We continue to look at options for a new building for the Bigfork Community Center.
- The North Valley Senior Center in Columbia Falls is working on some additional improvements to their building at their expense, including enclosing the side entry ramp.
- The Whitefish Community Center:
  - Offers an automated daily check-in call to interested members
  - Held its second annual Easter party on 3/24/18
  - Has applied to participate in the Whitefish Community Foundation's Great Fish Challenge. If approved, and if they are able to raise \$5,000 between July 26<sup>th</sup> and September 14<sup>th</sup>, they would receive matching funds from the Foundation.



# April 2018 Report: Performance Measures Tables - March 2018 stats (FY 2018)

75.00%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016	Mar	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%	not yet available	100	100	233	43%
# Receiving Meals on Wheels	471	450	470	104%	100%	11	335	346	465	74%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%	52	1,141	1,193	1,000	119%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%	12	300	312	500	62%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%	89%	90%	89%	88%	101%
Per Meal Cost of Nutrition Services	\$6.30	\$6.50	\$6.89	106%	109%	\$6.02	\$5.99	\$6.02	\$6.75	89%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL-96%	100%	100%	N/A	0%	N/A	95%	100%
Maximum annual number of transportation complaints	27	36	30	83%	111%	1	7	8	36	22%
WORKLOAD INDICATOR	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 17 as % FY 16		Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
<b>Outreach/Education/Media</b>						Mar				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%	7	84	91	120	76%
<b>Nutrition</b>						Mar				
Total Meals	78,541	82,000	82,428	101%	105%	6,725	53,936	60,661	79,000	77%
MOW	49,283		49,695	N/A	N/A	3,805	31,870	35,675		
Congregate	29,258		32,733	N/A	N/A	2,920	22,066	24,986		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%	54	1388	1,442	1,550	93%
<b>Transportation</b>						Mar				
Total Ride Count	91,196	94,000	85,305	91%	94%	8,277	68,275	76,552	90,000	85%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%	2,848	20,754	23,602	30,000	79%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%	5,429	47,521	52,950	60,000	88%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%	2	26	28	15	187%
<b>Information and Referral/Assistance</b>						Mar				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%	1,721	12,812	14,533	18,000	81%
<b>Independent Living</b>			38%			Feb				60%
Homemaker Units of Service	1,616	3,333	784	24%	49%	189	979	1,168	2,500	47%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%	399	1069	1,468	1,739	84%
Respite Units of Service	2,600	3,315	992	30%	38%	209	1271	1,480	2,468	60%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%	108	762	870	1,353	64%
Personal Care Units of Service	1,150	465	358	77%	31%	33	115	148	435	34%
<b>Benefits Counseling</b>						Mar				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A	21	380	401	450	89%
<b>Ombudsman</b>						Mar				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%	103	785	888	1,100	81%